

Topic: Veterans of Foreign Wars (VFW), Department of Montana Request for Funding for the Veteran Service Officer Program

Discussion: The VFW provides outreach services to veterans all across Montana via a network of VFW Post Service Officers (PSO), who has direct contact with veterans in all 56 counties. The work of the PSOs is supervised by a single Department of Veteran Affairs (VA) accredited, VFW certified, Veteran Service Officer (VSO) stationed on campus at Ft Harrison, MT. The job of PSOs is to be the initial contact person for veterans in their community. They provide the forms and assistance in completing healthcare applications, disability and pension claim forms, VA home loan forms, memorial burial marker forms, burial allowance forms, education allowance application forms, etc. In order for the VFW or any other veteran service organization to represent a veteran, the veteran must execute a power of attorney granting the veteran service organization the right to represent the veteran. All paperwork, when completed is sent to the VSO. Most applications require supporting documentation such as service records, birth certificates, marriage certificates; divorce certificates death certificates, etc. But the most important service the PSO performs is to put the veteran in touch with the VSO. The VSO will ensure the packet of information is complete, and forward to the VA for processing.

The VA provides a multitude of services to veterans of Montana, but the process of obtaining these services is complicated. In fact, the reason the VA accredits VSO's is to provide a trained person to assist veterans through the process to obtain the benefits and services to which they are entitled. VSO's are vital to ensure applications and claims are properly prepared. The Montana Department of Military Affairs has approximately 21 - 23 personnel hired to provide these services but still must depend on veteran service organizations to augment their efforts. The VFW has but one.

For the fiscal year ending September 30, 2011, the VFW VSO submitted 4,395 client inquiries to the VA. In the same year, there was \$16.7 million dollars infused to the Montana economy from VA benefits to Montana veterans as a direct result of the VFW VSO efforts. This total, \$16.7 million dollars earned by veterans residing in Montana and assisted by the Montana VFW VSO, for the period October 1, 2010 to September 30, 2011 is a very significant contribution to the economy of Montana. This feat is not an anomaly and has been replicated in several previous years.

The VFW VSO and an administrative assistant are paid salary and benefits by the Department of Montana VFW. PSOs are volunteers receiving no pay or allowances. Montana is one of a few VFW Departments that receive an annual grant from the VFW National Headquarters to help defray the cost of operating a VFW VSO. The Department of Montana has been informed that this grant will be discontinued in FY 2013. The grant amount is approximately \$50,000.00 per year. This is about two-thirds of the annual amount needed by our VSO to provide the necessary services to the veterans of Montana. Our budgets for FY 2012 anticipate a requirement of \$80,000.00 for that year. To date, the VFW Department of Montana has been unable to find a source of funding for us to continue the work of our VSO. At this time it appears that we will be forced to close our VSO office in FY 2013 unless a source of funding can be located.

The fact that VFW Department VSO helps hundreds of Montana veterans cannot be disputed. Nor can the fact that millions of dollars are brought into Montana as a direct result of the VSO's effort. This infusion of money from outside Montana undeniably aids our state economy. It only stands to reason that it is in the best interests of the state of Montana to ensure the continuing operation of the VFW VSO Office.

Recommendation: In view of the above, the VFW Department of Montana is requesting \$80,000.00 per year to fund the Montana VFW VSO Program.

DEPARTMENT OF MONTANA  
VETERANS OF FOREIGN WARS  
REVENUE FROM  
07/01/11 TO 06/30/12

SOURCE OF REVENUE	ESTIMATED REVENUE	AS OF 10/5/2011	BALANCE
DUES	57,720.00	39,818.11	17,901.89
COMMISSION OF SUPPLIES	500.00	676.05	+176.05
BUDDY POPPY	2,000.00	1,618.50	381.50
NATIONAL FUND RAISER	22,170.00	0	22,170.00
NATIONAL FUND RAISER N/M	460.00	0	450.00
DEPARTMENT FUND RAISER	18,000.00	1,176.00	16,824.00
SUPPLIES	500.00	948.31	+448.31
DELEGATE FEES	3,500.00	0	3,500.00
ADS & SUBSCRIPTION	24,000.00	9,910.83	14,089.17
VOD DONATIONS	2,500.00	0	2,500.00
PATRIOT'S PEN	1,000.00	0	1,000.00
LADIES AUXILIARY	250.00	250.00	0
INSURANCE ALLOWANCE	1,200.00	254.55	945.45
SERVICE OFFICE ALLOWANCE	50,733.00	13,616.59	37,116.41
	<b>184,533.00</b>	<b>68,268.94</b>	<b>116,254.06</b>

EXPENDITURES FROM  
07/01/11 TO 10/5/11

ACCOUNTS	BUDGETED	EXPENDED	BALANCE
ADJ/QM	26,000.00	6,500.00	19,500.00
TAXES (SS, MED, WC & UMP)	2,400.00	601.25	1,798.75
RETIREMENT (GLI/LTDI)	10,000.00	0	10,000.00
TRAVEL	3,000.00	806.60	2,193.40
FREIGHT & POSTAGE	2,000.00	518.90	1,481.10
OFFICE SUPPLIES	3,000.00	525.00	2,475.00
OFFICE EQUIPMENT	1,500.00	181.25	1,318.75
TELEPHONE	1,500.00	588.60	911.40
	<b>49,400.00</b>	<b>9,721.60</b>	<b>39,678.40</b>

EXPENDITURES FROM  
07/01/11 TO 10/5/11

PAGE 2

ACCOUNTS	BUDGETED	EXPENDED	BALANCE
SERVICE OFFICER	27,000.00	6,750.00	20,250.00
CLAIMS CONSULTANT	20,880.00	5,886.00	14,994.00
HEALTH INSURANCE	3,932.00	982.98	2,949.02
TAXES (SS, MED, WC & UMP)	4,800.00	1,035.41	3,764.59
RETIREMENT (GLI/LTDI)	18,791.00	0	18,791.00
TRAVEL	1,500.00	1,015.38	484.62
OFFICE SUPPLIES	1,200.00	111.00	1,089.00
POSTAGE	800.00	565.00	235.00
NATIONAL FUND RAISER-NM	460.00	0	460.00
OFFICE EQUIPMENT	600.00	594.00	6.00
TELEPHONE	1,500.00	588.60	911.40
	<b>81,463.00</b>	<b>17,528.37</b>	<b>63,934.63</b>
COMMANDER	4,200.00	1781.35	2,418.65
SR VICE COMMANDER	2,800.00	505.28	2,294.72
JR VICE COMMANDER	1,700.00	0	1,700.00
CHIEF OF STAFF	500.00	184.93	315.07
INSPECTOR	500.00	0	500.00
	<b>9,700.00</b>	<b>2,471.56</b>	<b>7,228.44</b>
AUDIT/BUDGET MEETING	500.00	250.00	250.00
COUNCIL OF ADMINISTRATION	2,400.00	0	2,400.00
DEPARTMENT CONVENTION	3,000.00	0	3,000.00
DEPARTMENT RAFFLE	7,000.00	0	7,000.00
	<b>12,900.00</b>	<b>250.00</b>	<b>12,650.00</b>
PUBLICATION	<b>20,500.00</b>	<b>4,874.82</b>	<b>15,625.18</b>
AMERICANISM	50.00	0	50.00
BUDDY POPPY	200.00	0	200.00
CITIZENSHIP/EDUCATION	450.00	0	450.00
COMMUNITY ACTIVITIES	300.00	0	300.00
ENT/FIREMAN/POLICEMAN	120.00	0	120.00
MEMBERSHIP	3,500.00	1,982.34	1,517.66
RECRUITERS	1,000.00	0	1,000.00
NATIONAL HOME	50.00	0	50.00
PATRIOT'S PEN	650.00	0	650.00
VOICE OF DEMOCRACY	2,400.00	0	2,400.00
YOUTH ACTIVITIES	150.00	0	150.00
	<b>8,870.00</b>	<b>1,982.34</b>	<b>6,887.66</b>
ANTICIPATED BALANCE			
END OF YEAR	<b>182,833.00</b>	<b>36,828.69</b>	<b>146,004.31</b>

# VETERANS OF FOREIGN WARS OF THE UNITED STATES

Date: 10/18/2011

## LUMP RETRO

VETERAN AWARD RECOVERY FROM 10/10 THRU 09/11

### TOTAL FILE

AWARD TYPE	AWARD AMOUNT (\$)	AVERAGE MONTHLY (\$)
COMPENSATION	13,677,982	1,139,832
PENSION-IMPROVED	1,921,636	160,136
PENSION-306	19,884	1,657
DEATH COMPENSATION	80,707	6,726
DEATH PENSION-IMPROVED	26,964	2,247
DEATH PENSION-306	6,492	541
DEATH PENSION-SPEC ACT	30,336	2,528
DIC	159,817	13,318
DIC SPECIAL ALLOWANCE	4,104	342
EDUC - CH 30	248,505	20,709
EDUC - CH 35	127,548	10,629
EDUC - CH 106	60,390	5,033
EDUC - SECT 901	87,296	7,275
VOC REHAB (CH 31)	316,625	26,385
	-----	-----
TOTAL	16,768,286	1,397,357

Date: 10/18/2011

Page: 1-01

VETERANS OF FOREIGN WARS OF THE UNITED STATES  
PRODUCTION REPORT FOR TOTAL FILE  
10/01/2010 THRU 09/30/2011

	NUMBER	TOT HR:MN	AVG HR:MN
1. CLIENTS VISITED	300		
2. PHONE CONTACT	1704		
3. CORRESPONDENCE RECEIVED	5526		
4. CORRESPONDENCE ORIGINATED	1284		
5. EMAIL RECEIVED	3946		
6. EMAIL SENT	1007		
7. HOSPITAL VISITS	1		
8. OUTREACH VISITS	374		
9. RECORDS CREATED	355	74:59	0:13
10. RECORDS EDITED	4040	274:57	0:04
11. FORMS GENERATED (subset of created/edited)	751	16:31	0:01
12. TOTAL VIMS CLIENT SERVICE	4395	349:56	0:05

Date: 10/18/2011

Page: 1-02

VETERANS OF FOREIGN WARS OF THE UNITED STATES  
VFW PRODUCTION REPORT FOR TOTAL FILE  
10/01/2010 THRU 09/30/2011

	NUMBER
1. CORRESPONDENCE RECEIVED	5526
2. CORRESPONDENCE ORIGINATED	1284
3. EMAIL RECEIVED	3946
4. EMAIL RESPONDED TO	1007
5. CASE FILES REVIEWED	6332
6. RATINGS CLEARED	317
7. RATINGS QUERIED	0
8. DRO CONFERENCES	5
9. DRO FAVORABLE DECISIONS	2
10. DRO UNFAVORABLE DECISIONS	0
11. HEALTH CARE REFERENCES	53
12. HOSPITALIZED VETERANS VISITED	1
13. OUTREACH VISITS	374
14. NEW MEMBERS	8

# VETERANS OF FOREIGN WARS OF THE UNITED STATES

Date: 10/18/2011

## LUMP RETRO

VETERAN AWARD RECOVERY FROM 10/10 THRU 09/11

### TOTAL FILE

AWARD TYPE	AWARD AMOUNT (\$)	AVERAGE MONTHLY (\$)
COMPENSATION	13,677,982	1,139,832
PENSION-IMPROVED	1,921,636	160,136
PENSION-306	19,884	1,657
DEATH COMPENSATION	80,707	6,726
DEATH PENSION-IMPROVED	26,964	2,247
DEATH PENSION-306	6,492	541
DEATH PENSION-SPEC ACT	30,336	2,528
DIC	159,817	13,318
DIC SPECIAL ALLOWANCE	4,104	342
EDUC - CH 30	248,505	20,709
EDUC - CH 35	127,548	10,629
EDUC - CH 106	60,390	5,033
EDUC - SECT 901	87,296	7,275
VOC REHAB (CH 31)	316,625	26,385
	-----	-----
TOTAL	16,768,286	1,397,357

Date: 10/18/2011

Page: 1-01

VETERANS OF FOREIGN WARS OF THE UNITED STATES  
PRODUCTION REPORT FOR TOTAL FILE  
10/01/2010 THRU 09/30/2011

	NUMBER	TOT HR:MN	AVG HR:MN
1. CLIENTS VISITED	300		
2. PHONE CONTACT	1704		
3. CORRESPONDENCE RECEIVED	5526		
4. CORRESPONDENCE ORIGINATED	1284		
5. EMAIL RECEIVED	3946		
6. EMAIL SENT	1007		
7. HOSPITAL VISITS	1		
8. OUTREACH VISITS	374		
9. RECORDS CREATED	355	74:59	0:13
10. RECORDS EDITED	4040	274:57	0:04
11. FORMS GENERATED (subset of created/edited)	751	16:31	0:01
12. TOTAL VIMS CLIENT SERVICE	4395	349:56	0:05



Date: 10/18/2011

Page: 1-02

VETERANS OF FOREIGN WARS OF THE UNITED STATES  
VFW PRODUCTION REPORT FOR TOTAL FILE  
10/01/2010 THRU 09/30/2011

	NUMBER
1. CORRESPONDENCE RECEIVED	5526
2. CORRESPONDENCE ORIGINATED	1284
3. EMAIL RECEIVED	3946
4. EMAIL RESPONDED TO	1007
5. CASE FILES REVIEWED	6332
6. RATINGS CLEARED	317
7. RATINGS QUERIED	0
8. DRO CONFERENCES	5
9. DRO FAVORABLE DECISIONS	2
10. DRO UNFAVORABLE DECISIONS	0
11. HEALTH CARE REFERENCES	53
12. HOSPITALIZED VETERANS VISITED	1
13. OUTREACH VISITS	374
14. NEW MEMBERS	8